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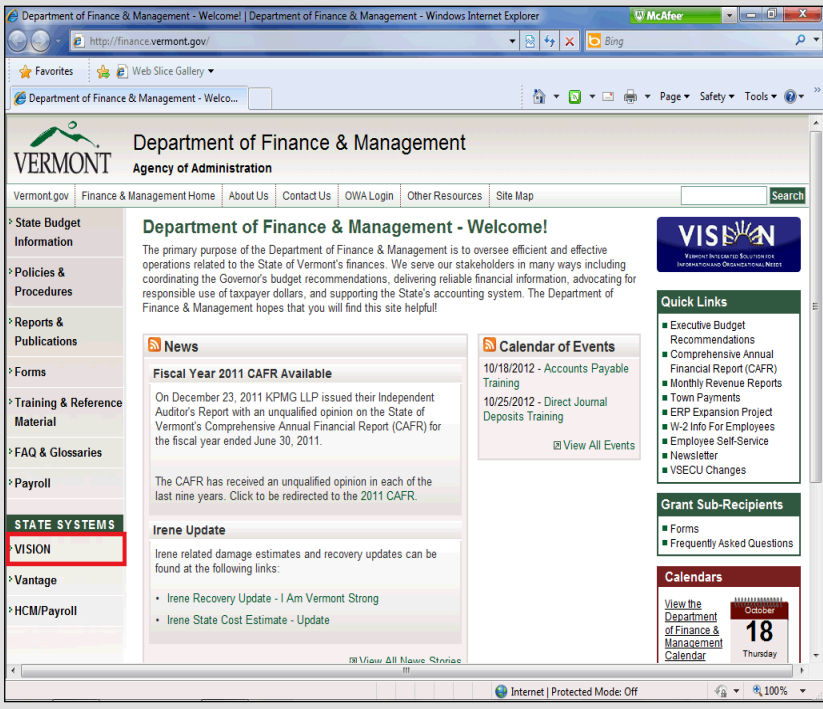
## Getting Started with VISION

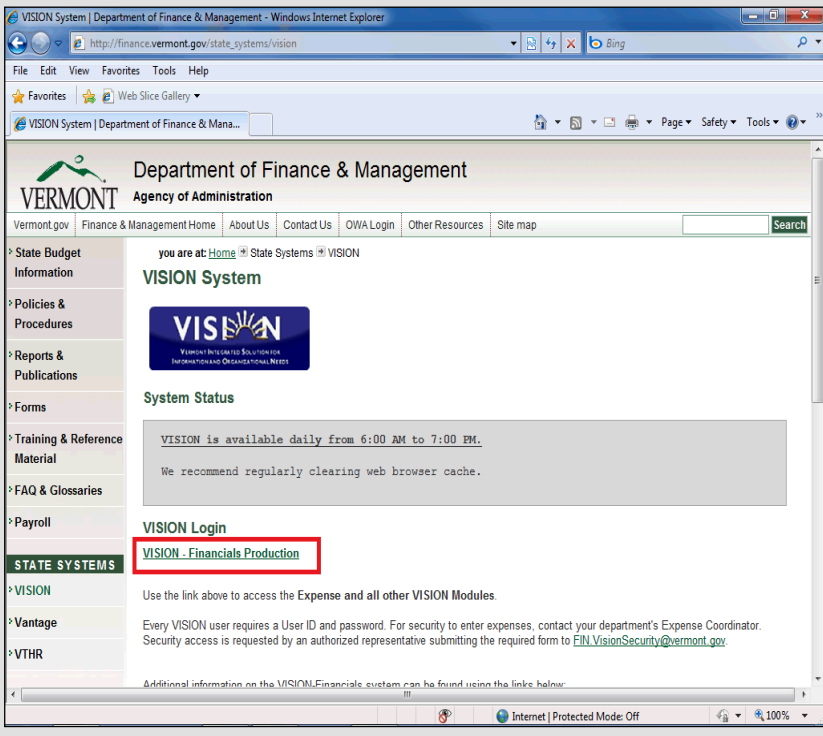
### Signing In

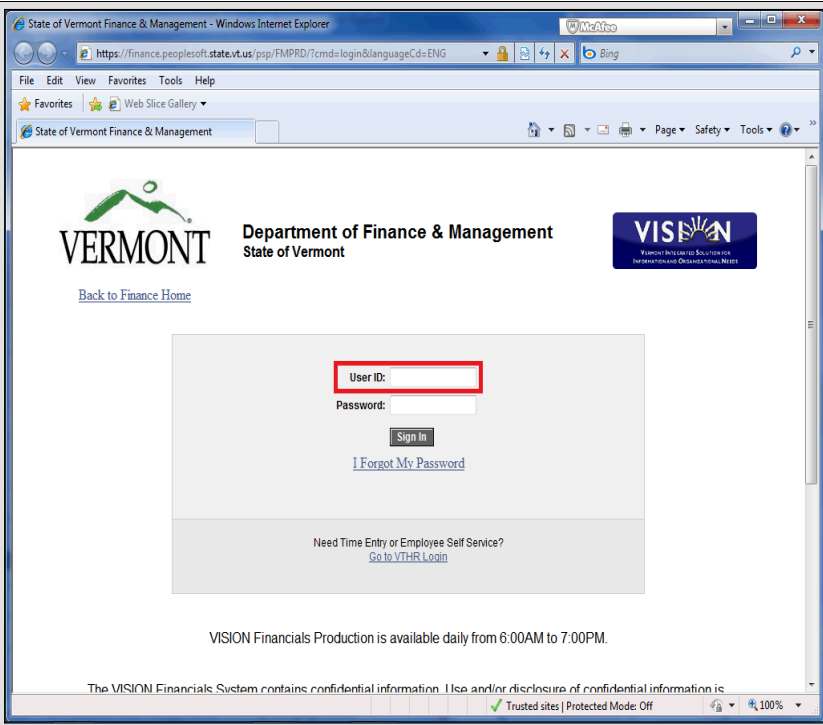
#### Procedure

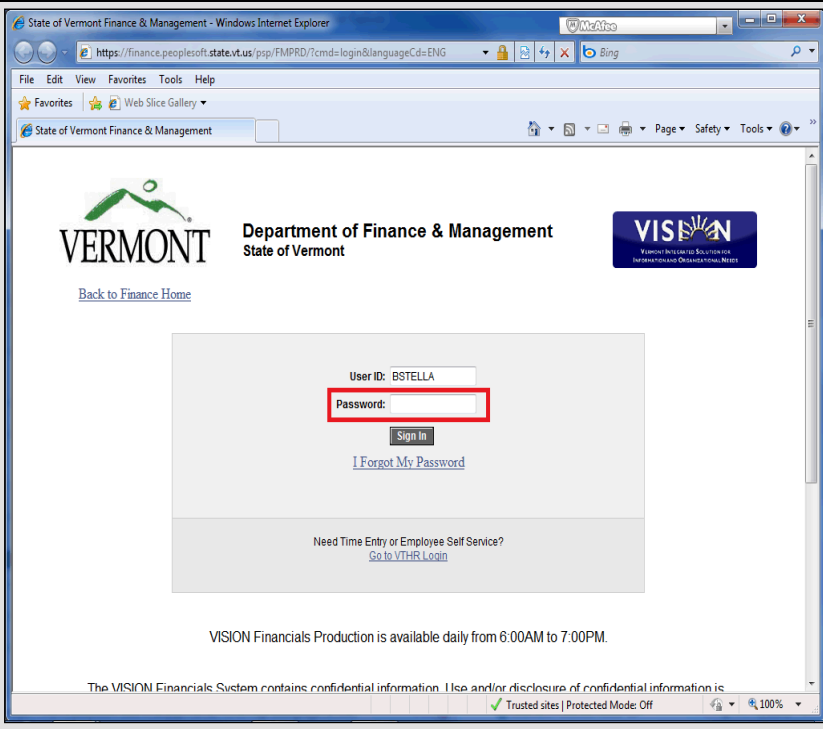
##### The Basics:


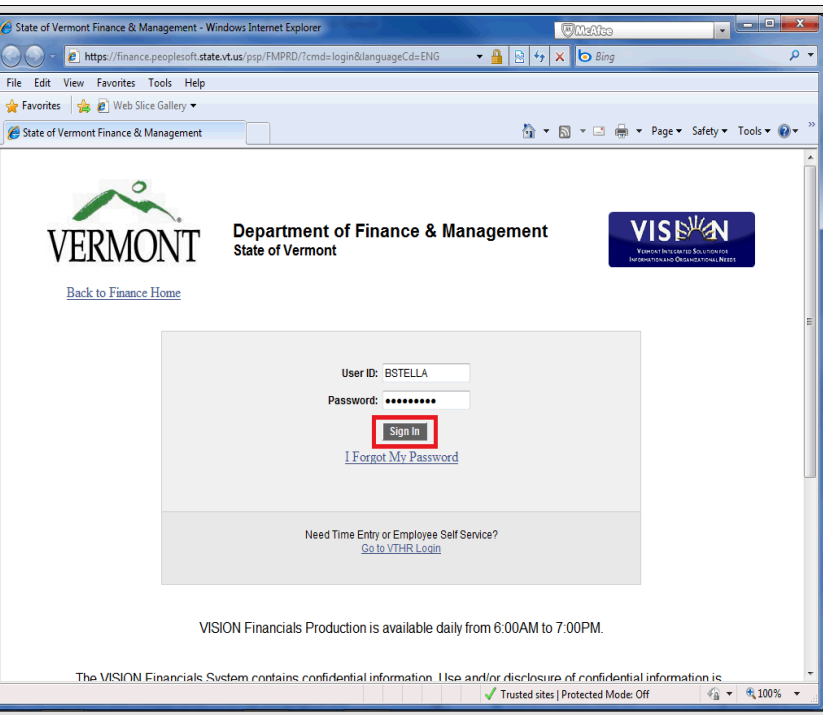
- VISION Financial Production login link can be found at the Department of Finance & Management webpage: <http://finance.vermont.gov/> (<http://finance.vermont.gov/>).
- Users will need to work with their Department Expense Coordinator to have an account set up and obtain login information.
- Login information should never be shared with anyone.
- Once logged in, save the link to VISION as a Favorite in your browser.

Step	Action	
1.	Click the <b>VISION</b> link. 	

Step	Action	
2.	Click the <b>VISION-Financial Production</b> link. <a href="#">VISION - Financials Production</a>	 <p>The screenshot shows the VISION System homepage. The 'VISION - Financials Production' link is highlighted in a red box under the 'STATE SYSTEMS' section. The page includes a navigation menu, a search bar, and a 'System Status' section indicating that VISION is available daily from 6:00 AM to 7:00 PM.</p>

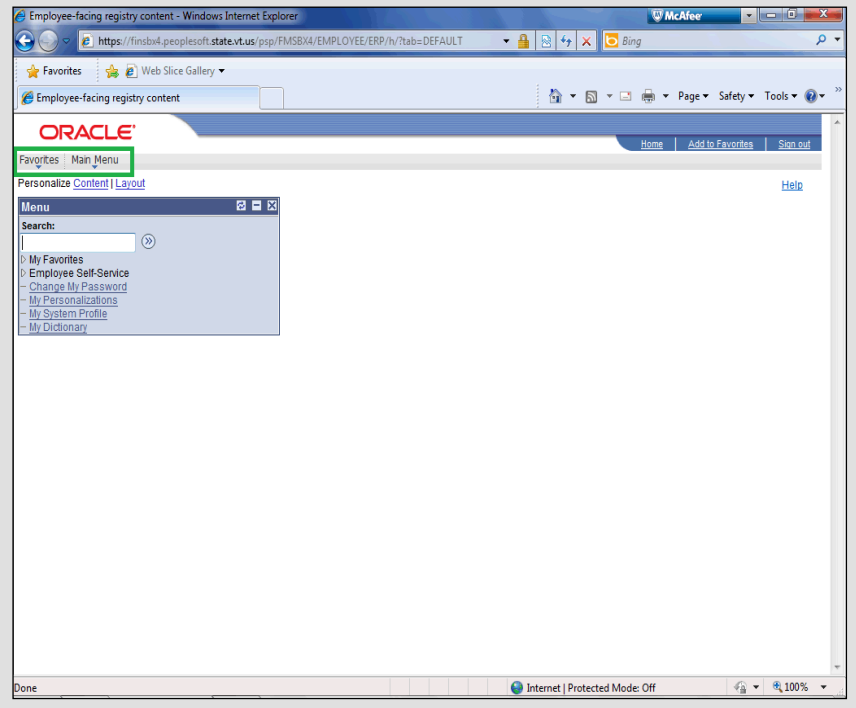
Step	Action	
3.	Enter your User ID in the <b>User ID</b> field.  Typically it is the First letter of your first name followed by up to the first 7 characters of last name in UPPERCASE. Some users might have also have a number at the end of the user ID.	 <p>The screenshot shows the VISION System login page. The 'User ID' field is highlighted in a red box. The page includes a 'Sign In' button, a 'Forgot My Password' link, and a 'Need Time Entry or Employee Self Service?' section with a 'Go to VTHR Login' link. The page also displays the VISION System logo and the text 'VISION Financials Production is available daily from 6:00AM to 7:00PM.'</p>

Step	Action	
4.	<p>Enter your password into the <b>Password</b> field.</p> <p>VISION passwords are case sensitive and contain at least 8 characters and at least one number.</p> <p>You need to set up <b>I Forgot My Password</b> ahead of time to be able to use it. See the Set up Forgotten Password Help and Email tutorial for step by step instructions.</p>	 <p>The screenshot shows the login page for the State of Vermont Finance &amp; Management system. The 'User ID' field contains 'BSTELLA'. The 'Password' field is empty and highlighted with a red rectangle. Below the password field is a 'Sign In' button. There is also a link for 'I Forgot My Password'. The page header includes the Vermont logo and the text 'Department of Finance &amp; Management, State of Vermont'. The footer mentions 'VISION Financials Production is available daily from 6:00AM to 7:00PM'.</p>

Step	Action	
5.	<p>Click the <b>Sign In</b> button.</p> 	 <p>The screenshot shows the login page for the State of Vermont Finance &amp; Management system. The 'User ID' field contains 'BSTELLA'. The 'Password' field is filled with dots. The 'Sign In' button is highlighted with a red rectangle. There is also a link for 'I Forgot My Password'. The page header includes the Vermont logo and the text 'Department of Finance &amp; Management, State of Vermont'. The footer mentions 'VISION Financials Production is available daily from 6:00AM to 7:00PM'.</p>

## Helpful Hints:

- Use the menu in VISION to navigate. Using the browser back button could pop you out of VISION and you will lose all unsaved work.
- Menu options vary depending on security level. Expense users might only have access to Employee Self-Service.
- Clear Cache often to avoid errors. For most browsers, the short cut CTRL+SHIFT+DEL will open the delete browsing history window. See UPK Clearing Cache for more instructions.




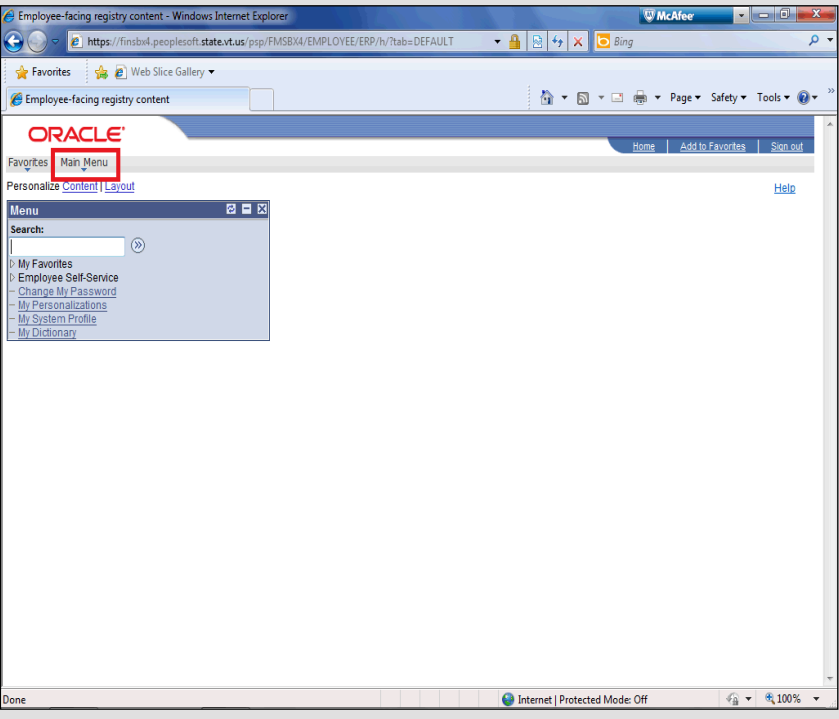
**End of Procedure.**

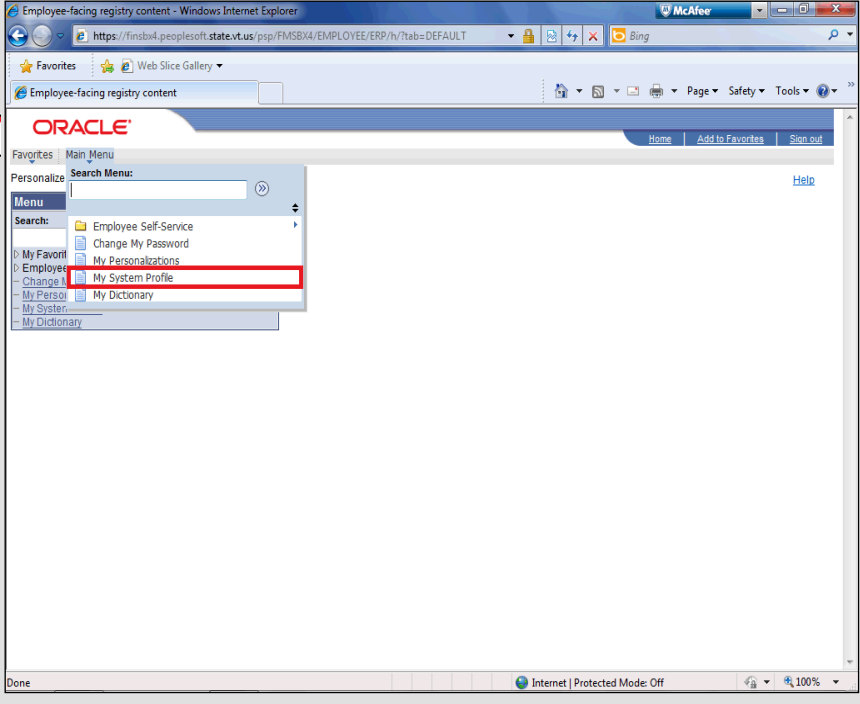
## Set up Forgotten Password Help and Email

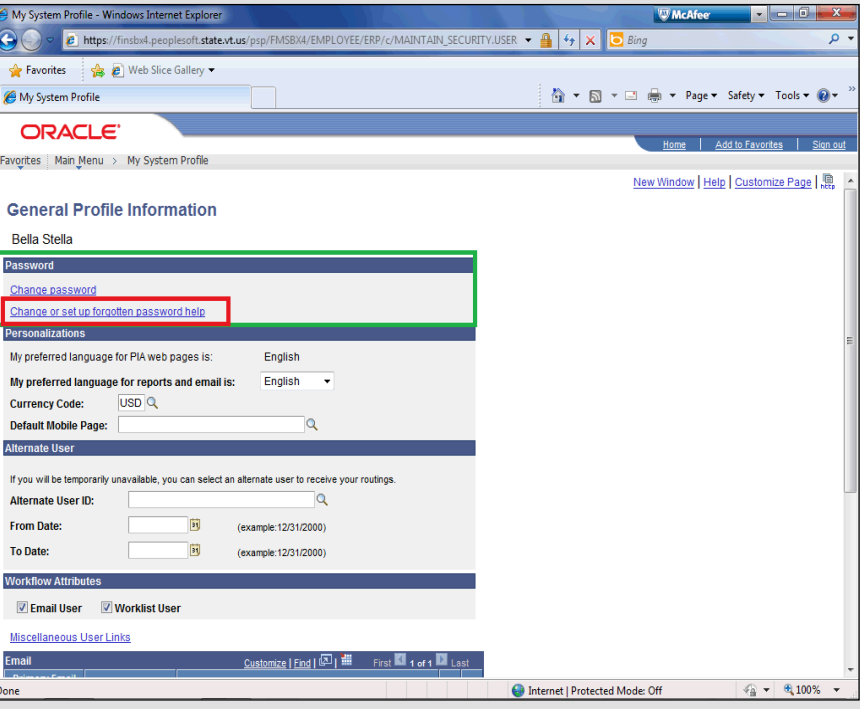
### Procedure

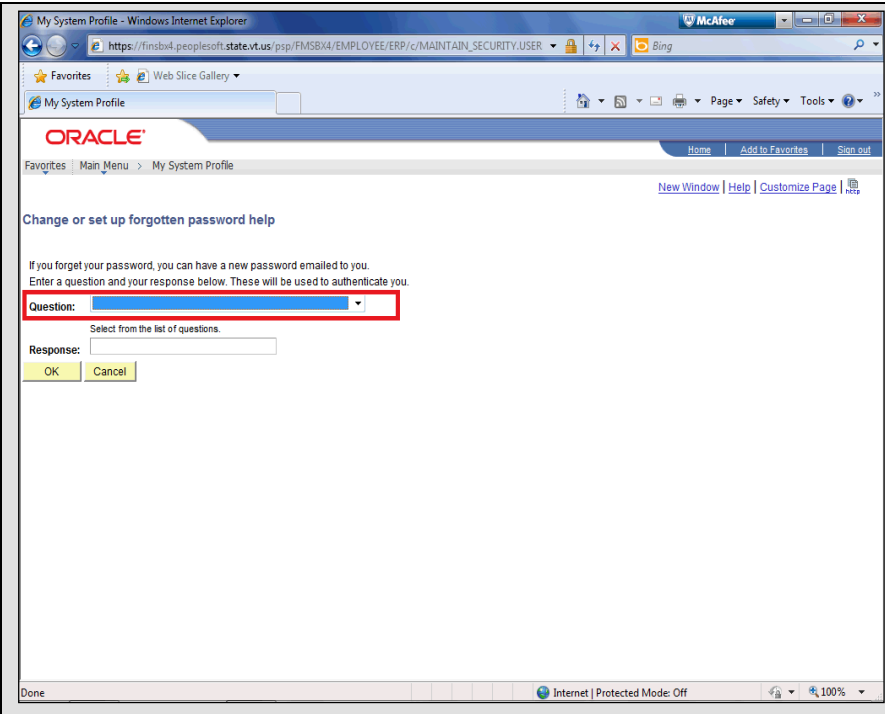
#### The Basics:

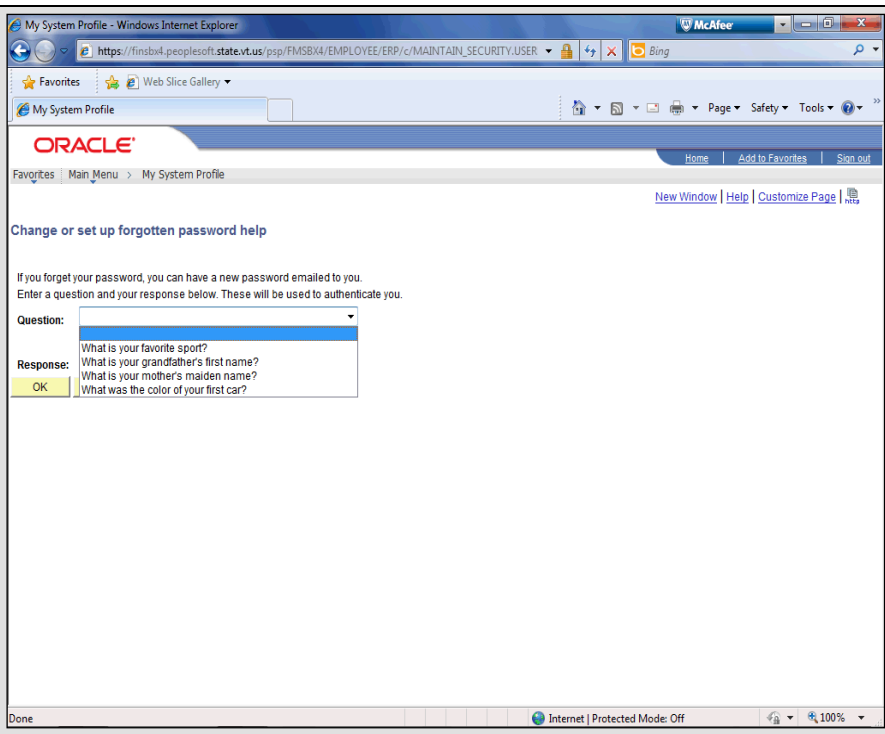
- Each user **must** set up forgotten password help. This feature allows a user to reset the password through email by clicking "I Forgot My Password" on the login screen.
- The Forgotten password link should be used after the 2<sup>nd</sup> login attempt. After the 3<sup>rd</sup> attempt, your account will lock and the password that is emailed to you will not work. To unlock your account, you will need to call VISION Support at 828-6700 Option 2 to be unlocked.

Step	Action	
1.	Click the <b>Main Menu</b> button. 	 <p>The screenshot shows a web browser window displaying the Oracle HR system interface. The URL bar shows a link to the state of Vermont's HR system. The page has a blue header with the Oracle logo. A 'Main Menu' button is highlighted with a red box. Below the header, there is a 'Menu' section with a search bar and a list of links including 'My Favorites', 'Employee Self-Service', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'.</p>

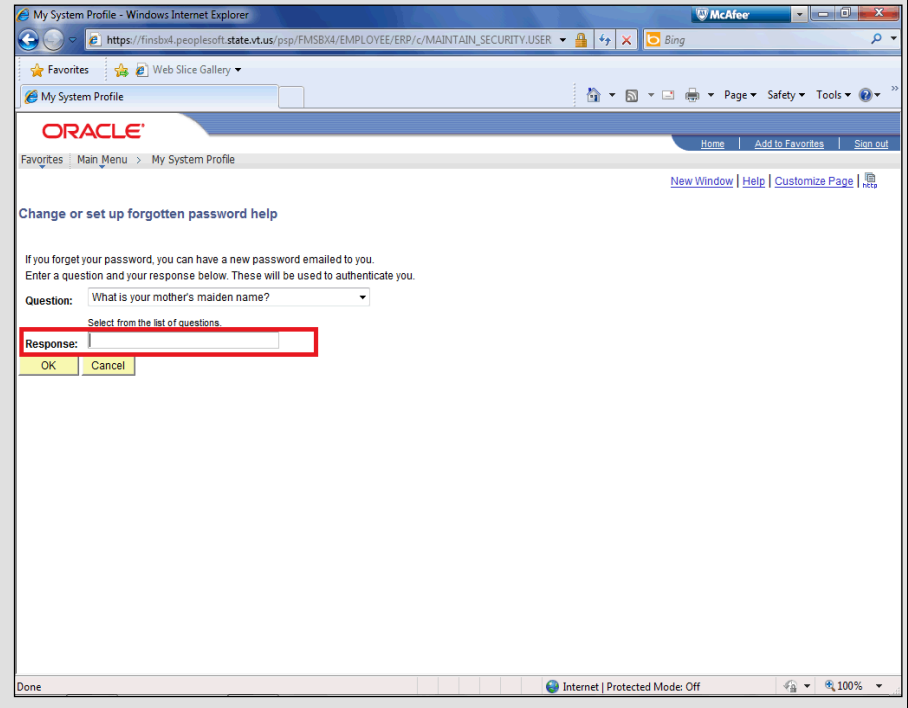
Step	Action	
2.	<p>Click on <b>My System Profile</b>.</p> <p><a href="#">My System Profile</a></p>	

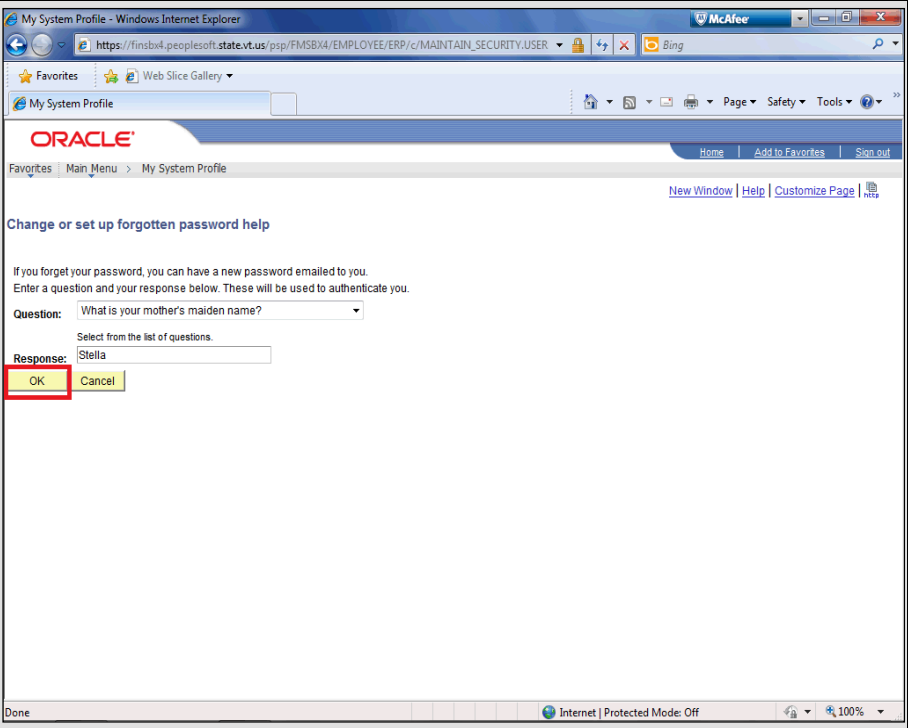
Step	Action	
3.	<p>Click the <b>Change or set up forgotten password help</b> link.</p> <p><a href="#">Change or set up forgotten password help</a></p>	

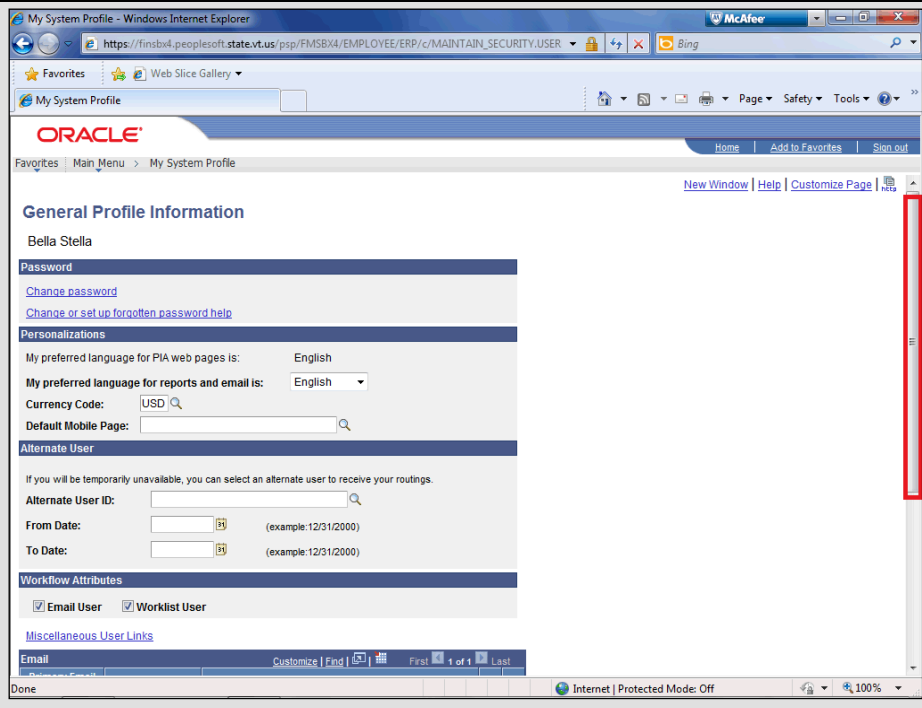
Step	Action	
4.	Click the <b>Question</b> drop box to see a list of available options.	 <p>The screenshot shows the Oracle PeopleSoft 'My System Profile' page. The browser address bar shows the URL: https://fmsbx4.peoplesoft.state.vt.us/psp/FMSBX4/EMPLOYEE/ERP/c/MAINTAIN_SECURITY.USER. The page title is 'My System Profile'. The Oracle logo is visible at the top. Below the logo, there are links for 'Home', 'Add to Favorites', and 'Sign out'. The main content area is titled 'Change or set up forgotten password help'. It contains instructions: 'If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.' Below this, there is a 'Question:' dropdown menu, which is highlighted with a red box. Below the dropdown is a 'Response:' text input field. At the bottom of the form are 'OK' and 'Cancel' buttons. The browser status bar at the bottom shows 'Internet   Protected Mode: Off' and a zoom level of 100%.</p>

Step	Action	
5.	There are 4 questions to choose from. Choose the question that works best for you.	 <p>The screenshot shows the same Oracle PeopleSoft 'My System Profile' page as in step 4. The 'Question:' dropdown menu is now open, displaying a list of four questions: 'What is your favorite sport?', 'What is your grandfather's first name?', 'What is your mother's maiden name?', and 'What was the color of your first car?'. The 'Response:' text input field is still empty. The 'OK' and 'Cancel' buttons are at the bottom. The browser status bar at the bottom shows 'Internet   Protected Mode: Off' and a zoom level of 100%.</p>




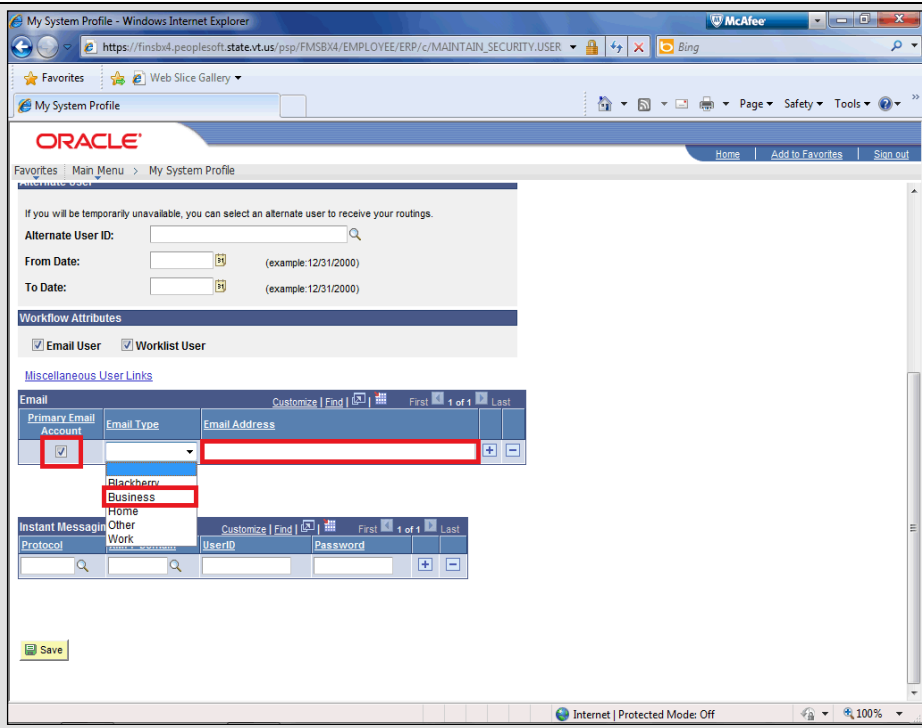
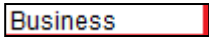
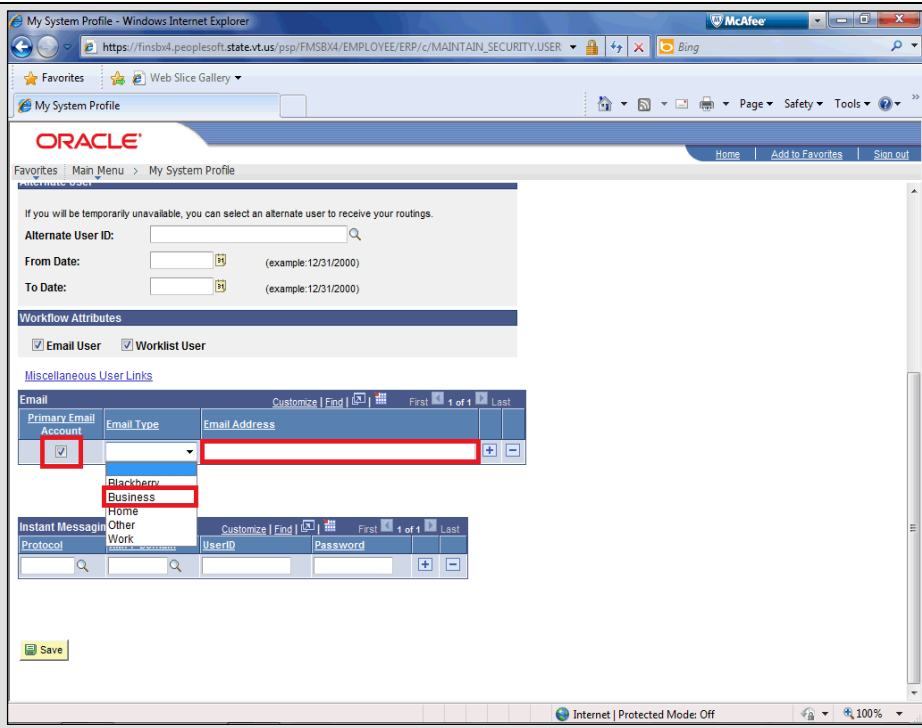
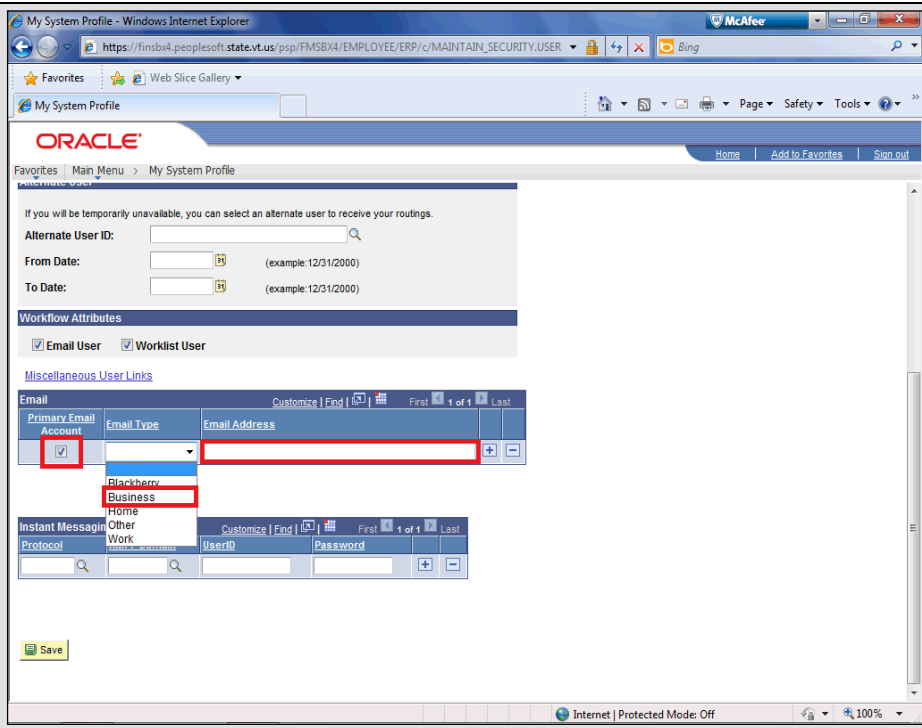
Step	Action	
6.	Enter your response to the security question.	


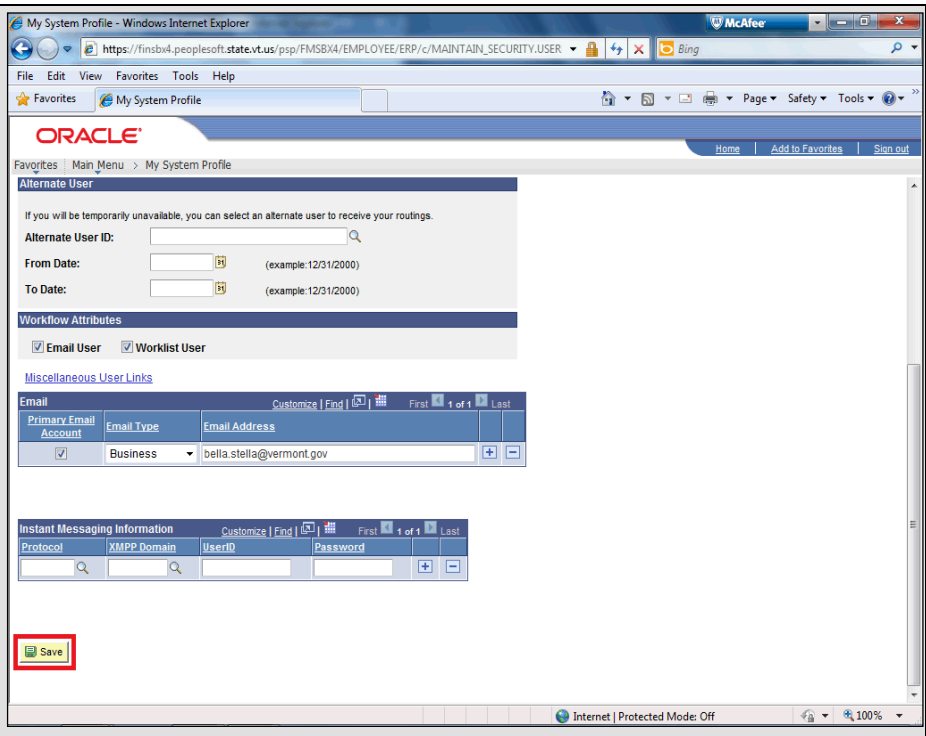
Step	Action	
7.	Click the <b>OK</b> button.	

Step	Action	
8.	To see the email section,  Scroll down the screen using the scrollbar.	

This e-mail address is **very important!** This is the address the system uses for expense notifications to employees and approvers, including the "I Forgot My Password" help.

If you are not receiving notifications as you should, check to make sure the address below is correct. If it is correct, check your Junk E-mail folder. You can fix the Junk E-Mail problem by adding the From address to Outlook comments.

Step	Action	
9.	Select the <b>Primary E-mail Account</b> option. 	
Step	Action	
10.	Choose <b>Business</b> from the <b>E-mail Type</b> drop down list. 	
Step	Action	
11.	Enter your email address into the <b>Email Address</b> field.	

Step	Action	
12.	Click the <b>Save</b> button. 	

After completing these steps, the "I Forgot My Password" link on the login page will prompt you for the answer to your challenge question. After correctly answering this question a temporary password will be emailed to you. The temporary password case sensitive and must be entered in the password field exactly as it was emailed.


**End of Procedure.**

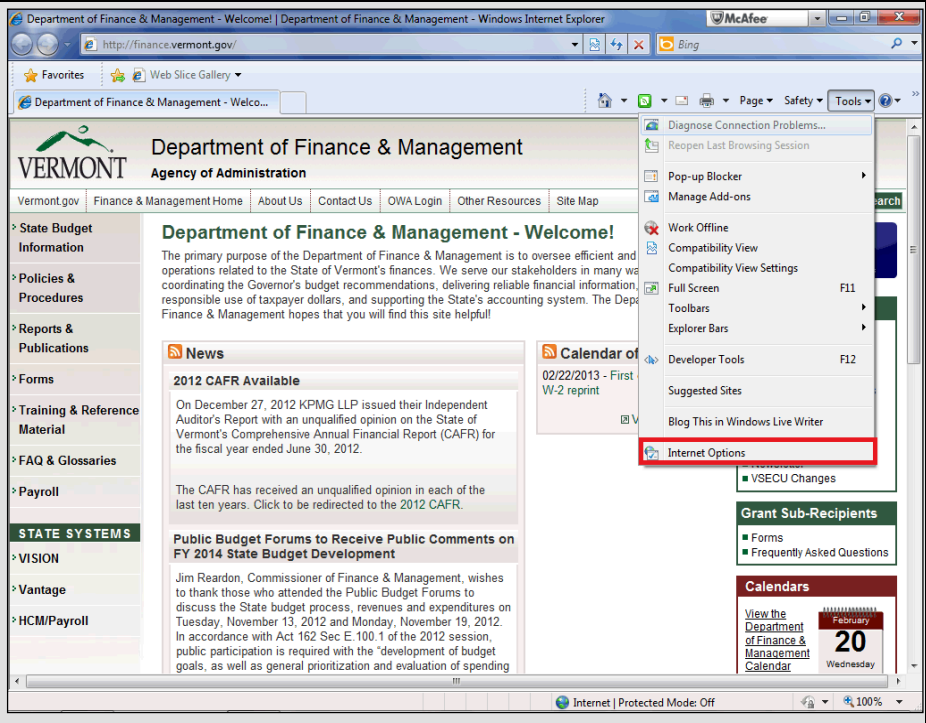
## Clear Cache in Internet Explorer 8

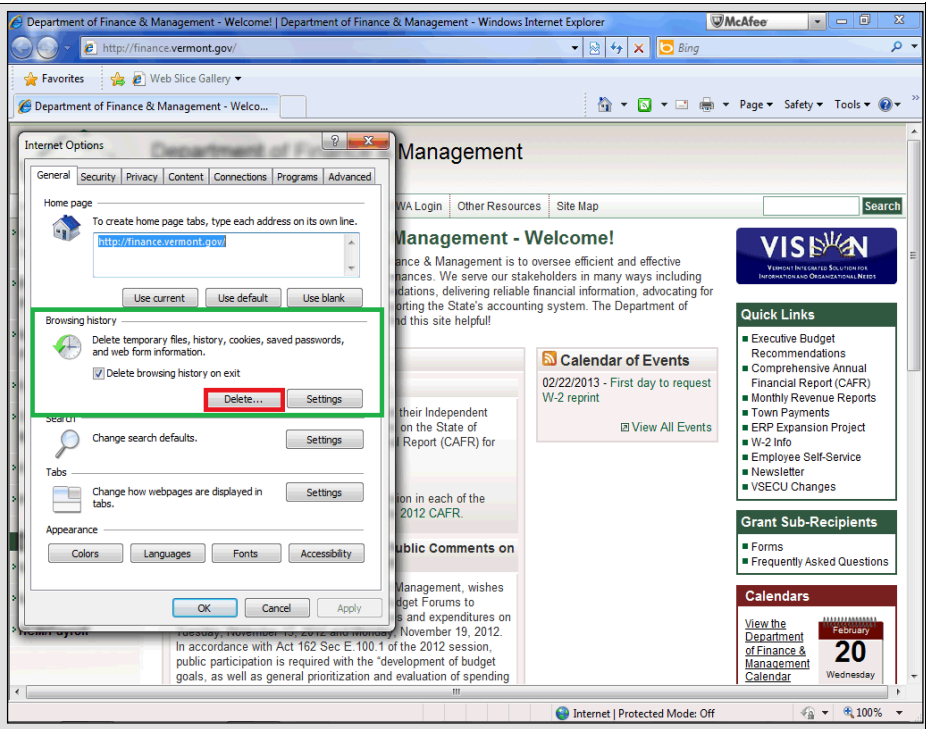
### Procedure


#### The Basics:

- Clearing cache (deleting Temporary Internet files or Cookies) is a frequently used maintenance tool to resolve and/or avoid some common error messages.
- Your use of the web determines how often the cache should be cleared. A good practice is to clear cache at least once a week to avoid error messages such as “Page Cannot Be Displayed” when trying to log in or “invalid URL” when navigating. If either of these error messages are received, you should first follow these steps before calling Finance Support.
- For most browsers, the short cut CTRL+SHIFT+DEL will open the delete browsing history window

Step	Action	
1.	Open or navigate to Internet Explorer.  Click the <b>Tools</b> button.	

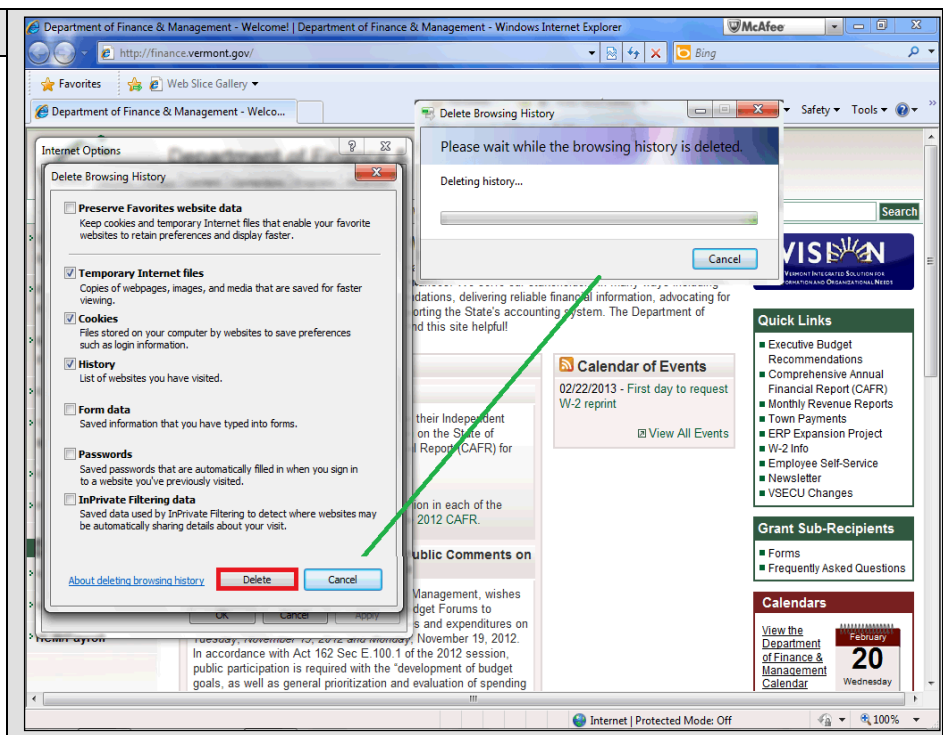
Step	Action	
2.	Click the <b>Internet Options</b> menu.	

Step	Action	
3.	On the General Tab in the Browsing History section, Click the <b>Delete...</b> button.	

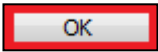
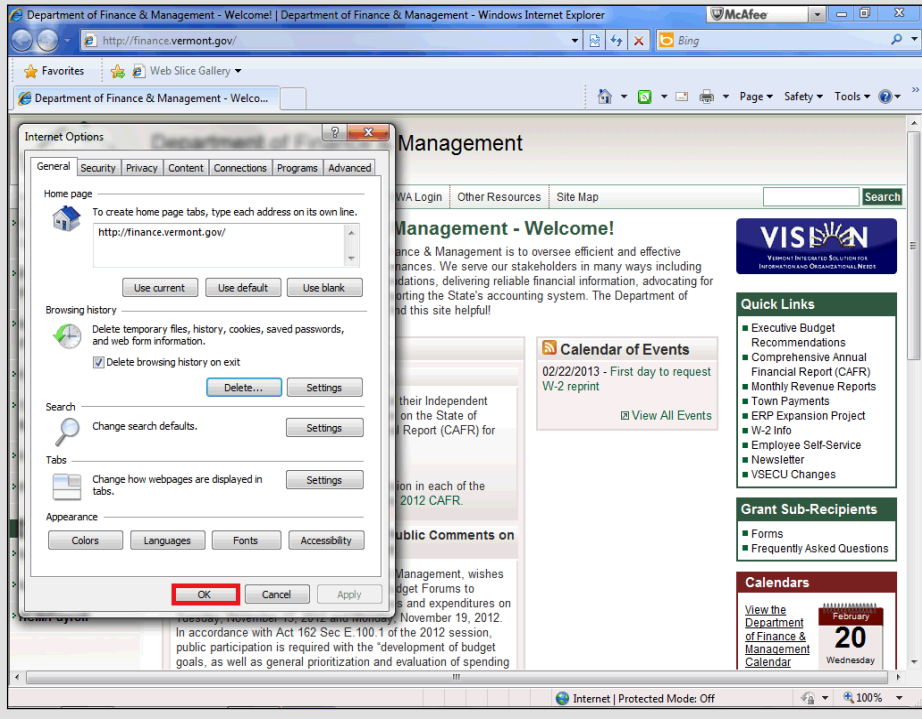
Step	Action
4.	The Delete Browsing History page displays with Preserve Favorites website data, Temporary Internet files, Cookies and History boxes checked.
Step	Action
5.	<p>The Preserve Favorite box needs to be unchecked,</p> <p>Click the <b>Preserve Favorites website data</b> checkbox to uncheck.</p> 


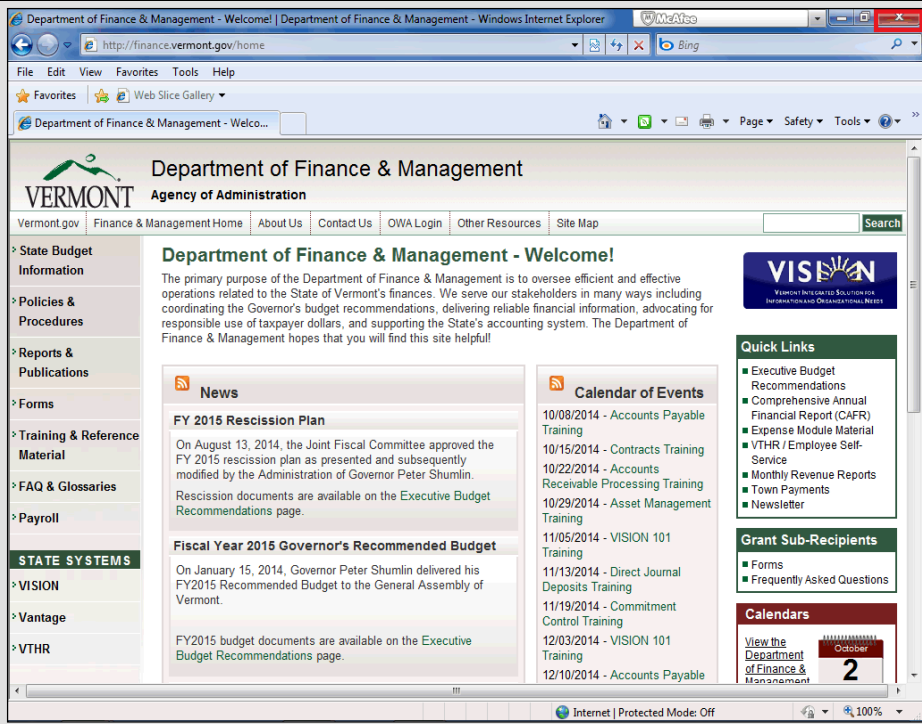


Step	Action
6.	<p>Click the <b>Delete</b> button.</p> <p>After pressing delete, a Delete Browsing History box appears showing the deletion in progress.</p>





Step	Action	
7.	<p>Once the deleting process completes you are returned to Internet Options.</p> <p>Click the <b>OK</b> button.</p> 	

Step	Action	
8.	<p>The last step is closing out of all open Internet Explorer windows.</p> <p>Click the <b>Close</b> button.</p> 	

Following these steps will clear the internet files and most often removes any cause of particular error messages. If this does not resolve your issue, contact VISION Finance Support at 802-828-6700, Option 2.

**End of Procedure.**

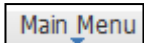
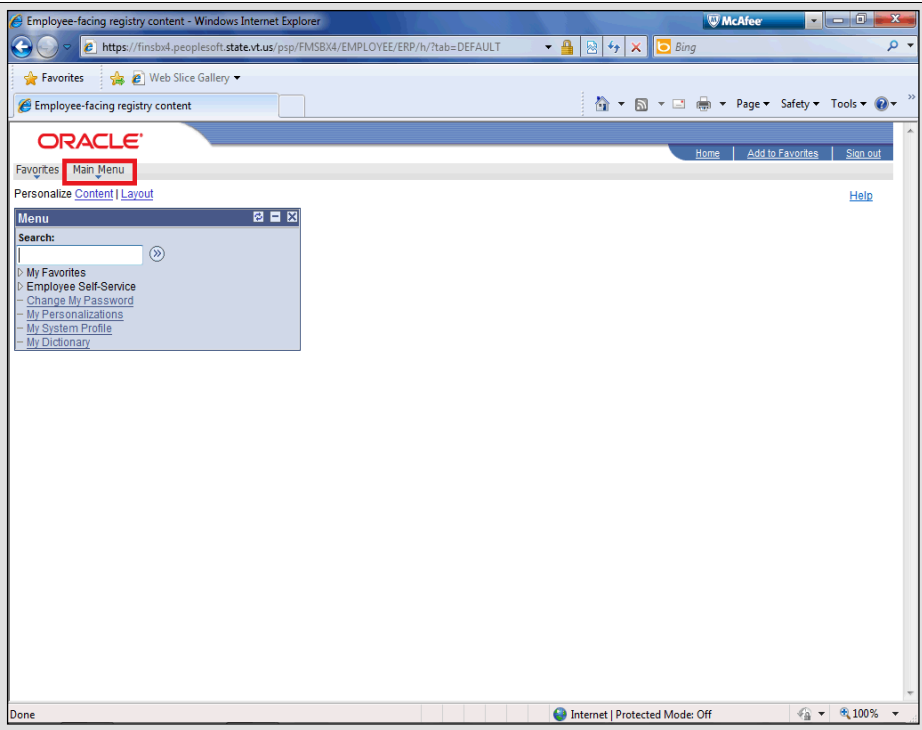
## Change password

### Procedure


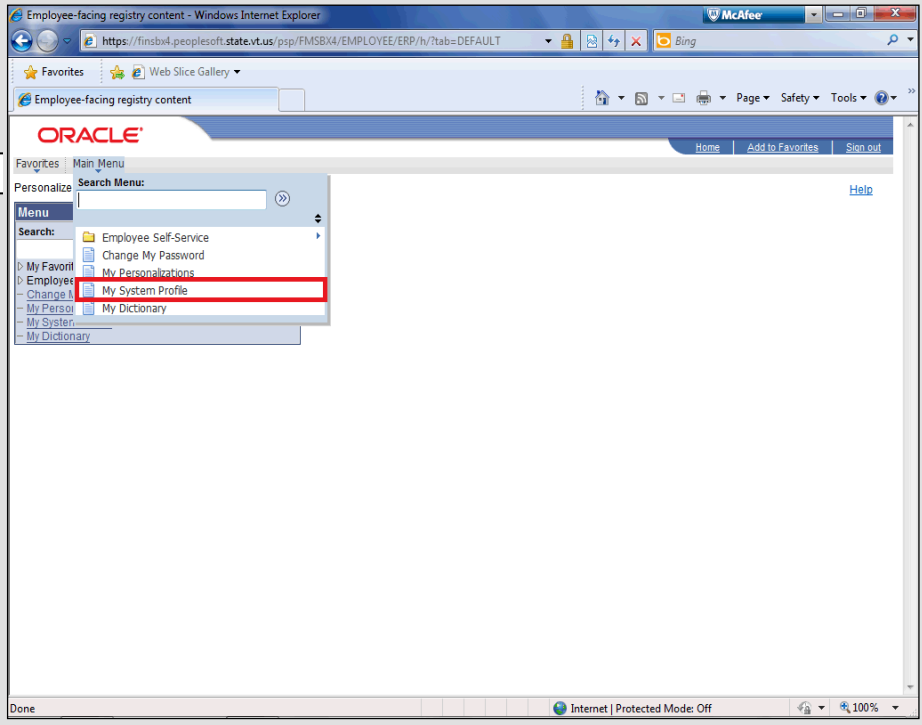
#### The Basics:


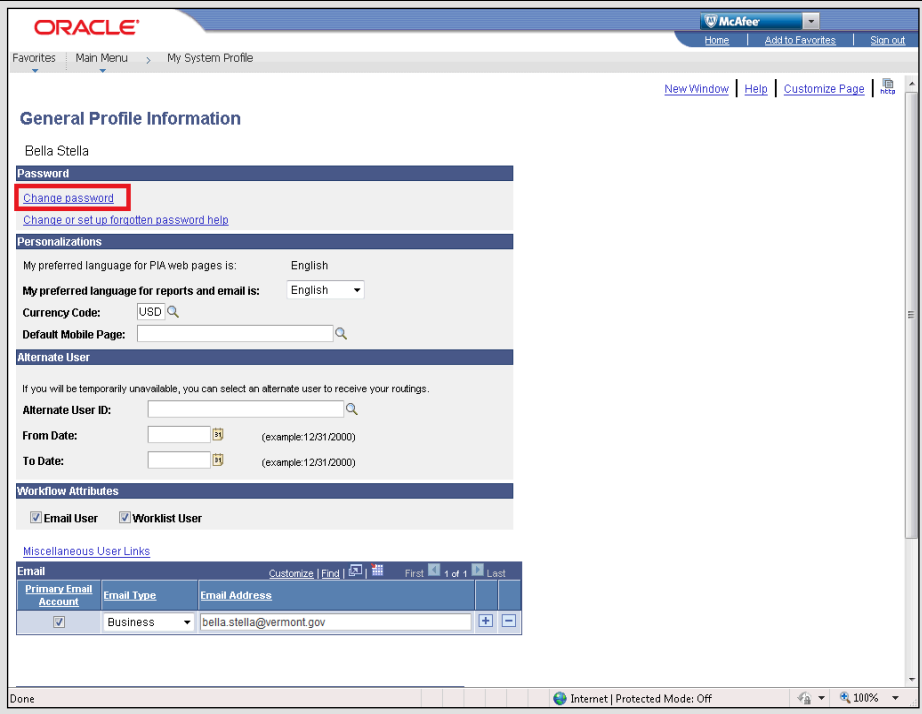
- Login information should never be shared with anyone.
- Passwords can be changed by the user or VISION Support when necessary.
- VISION passwords are case sensitive and need to contain at least 8 characters and at least one number.
- Passwords expire every 90 days and previous passwords can't be used again. The system will prompt you when your password has expired.

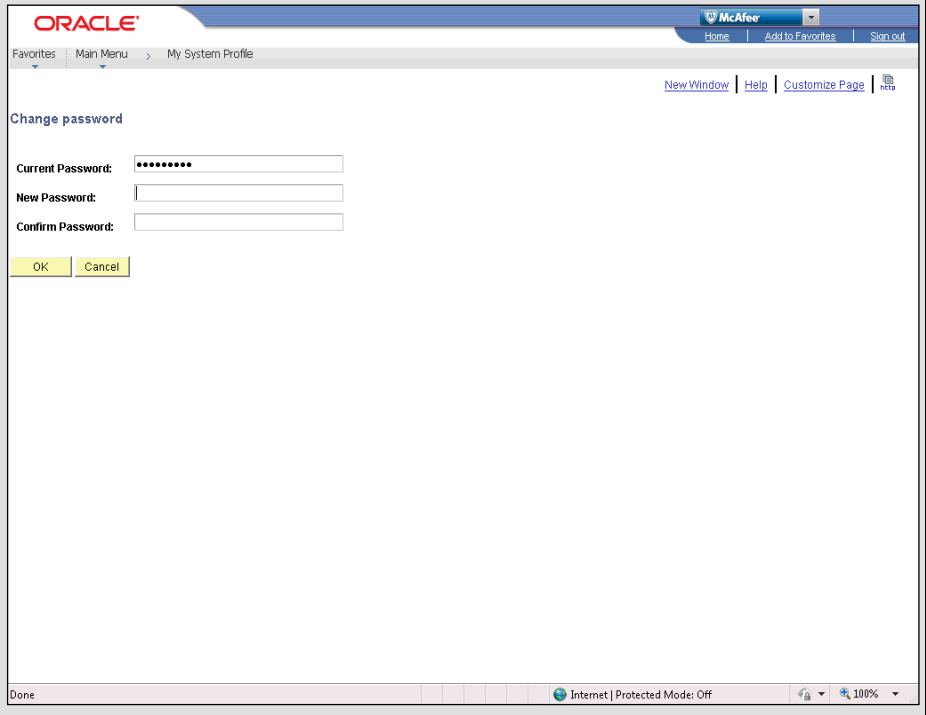
Let's Begin.

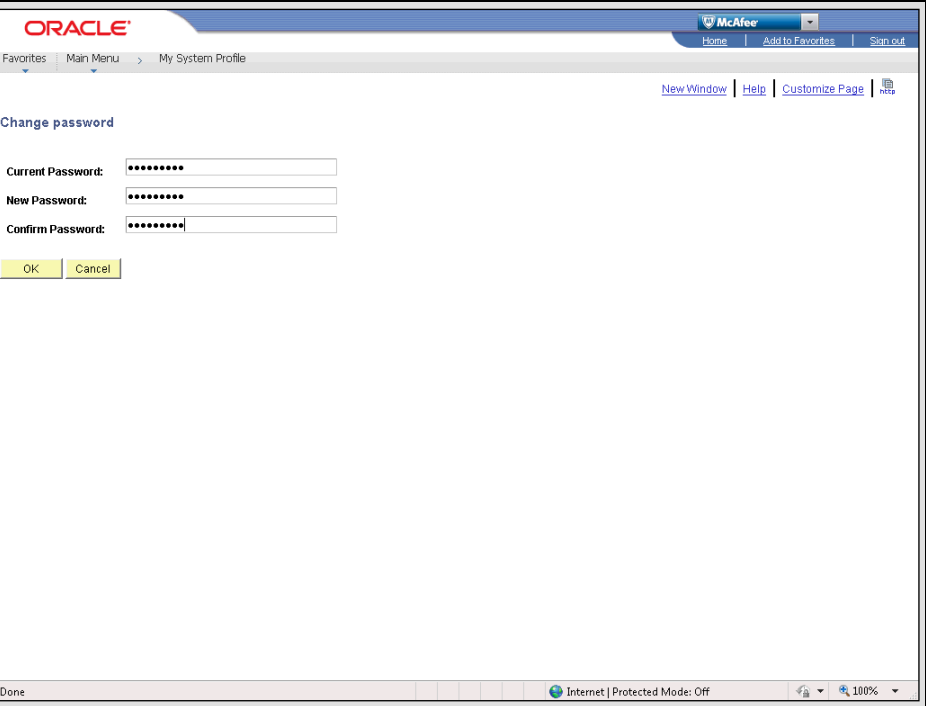
Step	Action	
1.	Click the <b>Main Menu</b> button. 	


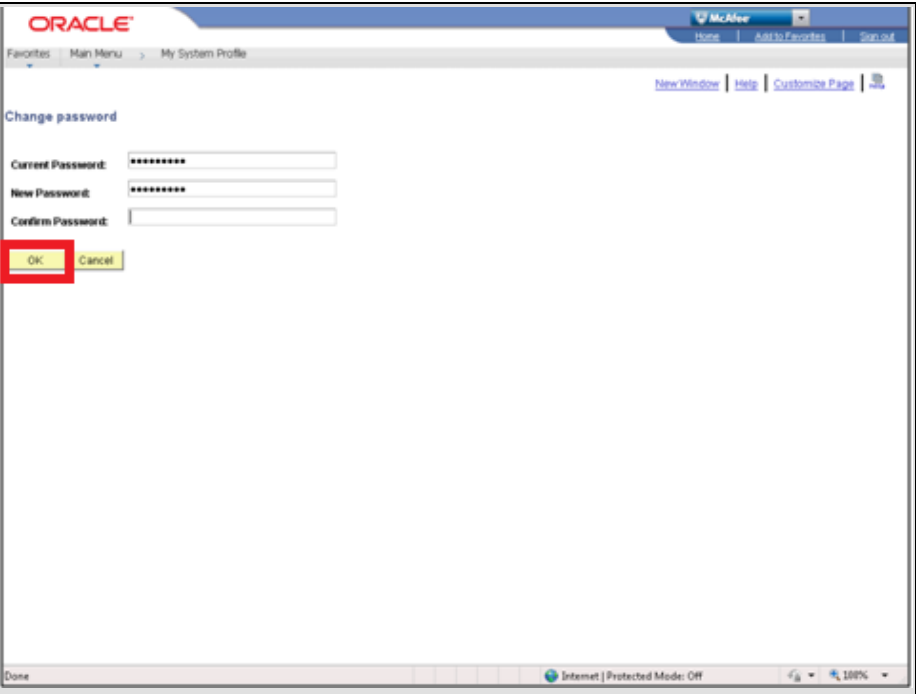


Step	Action	
2.	Click on <b>My System Profile</b> or <b>Change my Password</b> link.  <b>My System Profile</b>	

Step	Action	
3.	Click the <b>Change password</b> link.  <b>Change password</b>	

Step	Action	
4.	Enter the current password into the <b>Current Password</b> field.	

Step	Action	
5.	Enter a new password into the <b>New Password</b> field.  <b>Password requirements:</b> <ul style="list-style-type: none"> <li>• At least 8 Characters</li> <li>• At least one number</li> <li>• Can't be previously used</li> </ul>	
Step	Action	
6.	Enter new password again into the <b>Confirm Password</b> field	

Step	Action	
7.	Click the <b>OK</b> button. 	 <p>The screenshot shows the Oracle 'Change password' page. It includes fields for 'Current Password', 'New Password', and 'Confirm Password', each with a masked password (*****). At the bottom left, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangular box.</p>


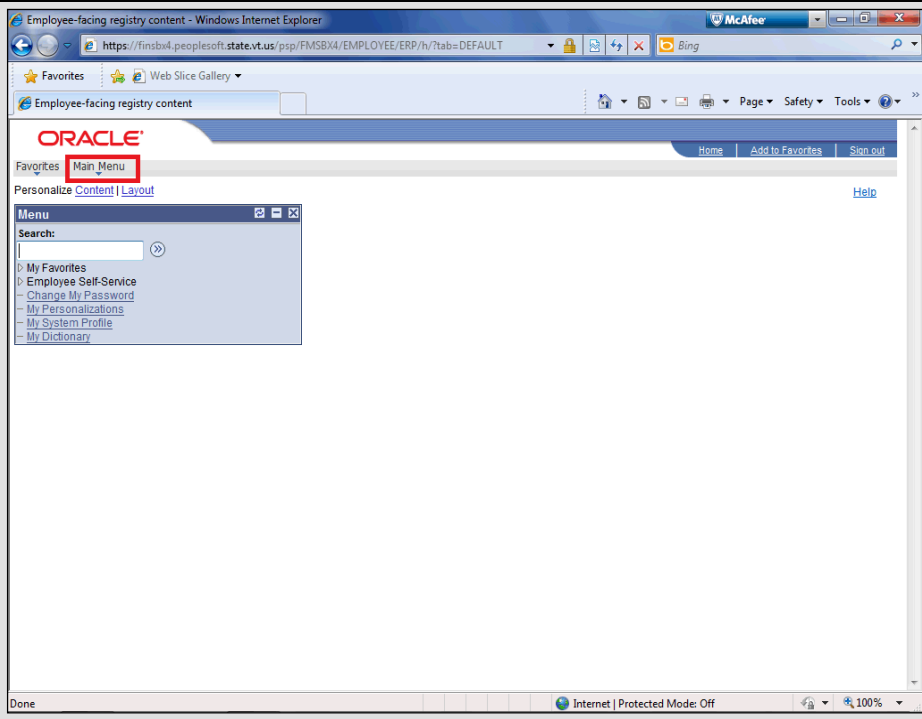
**End of Procedure.**

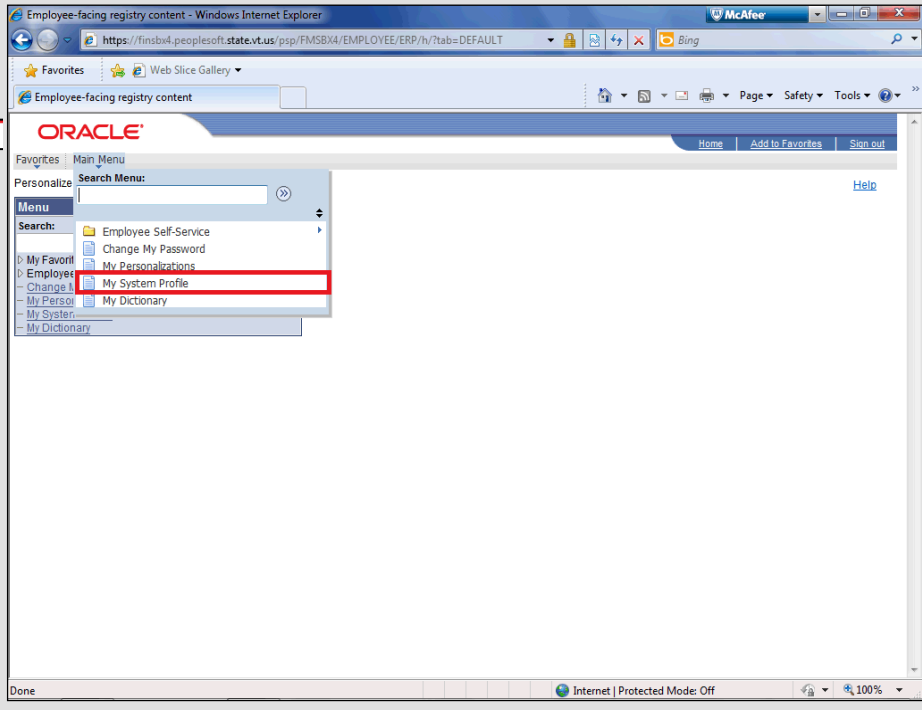
## Set up Alternate Approver

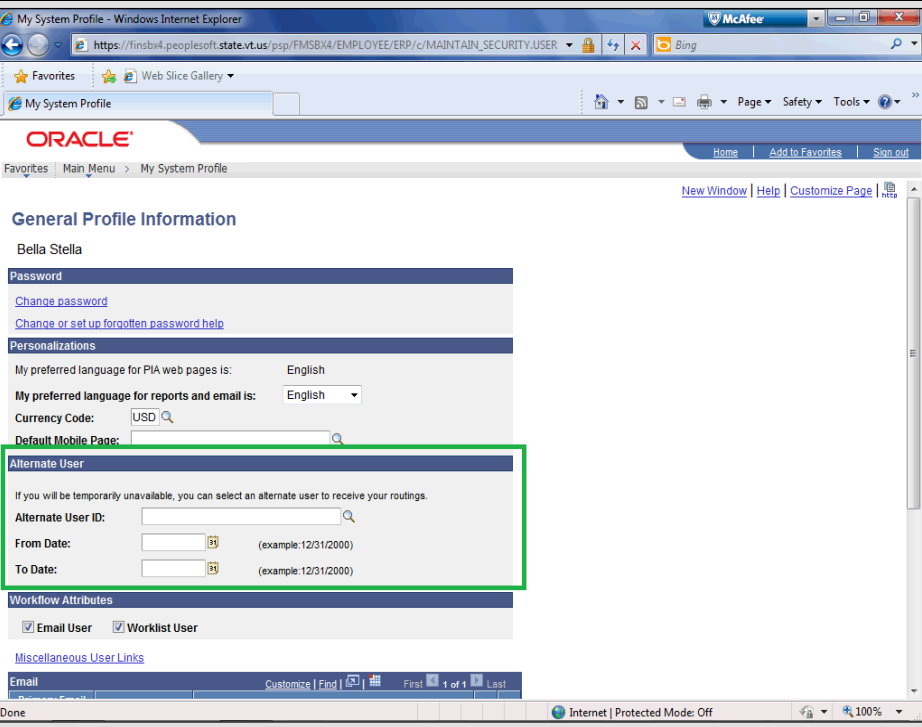
### Procedure

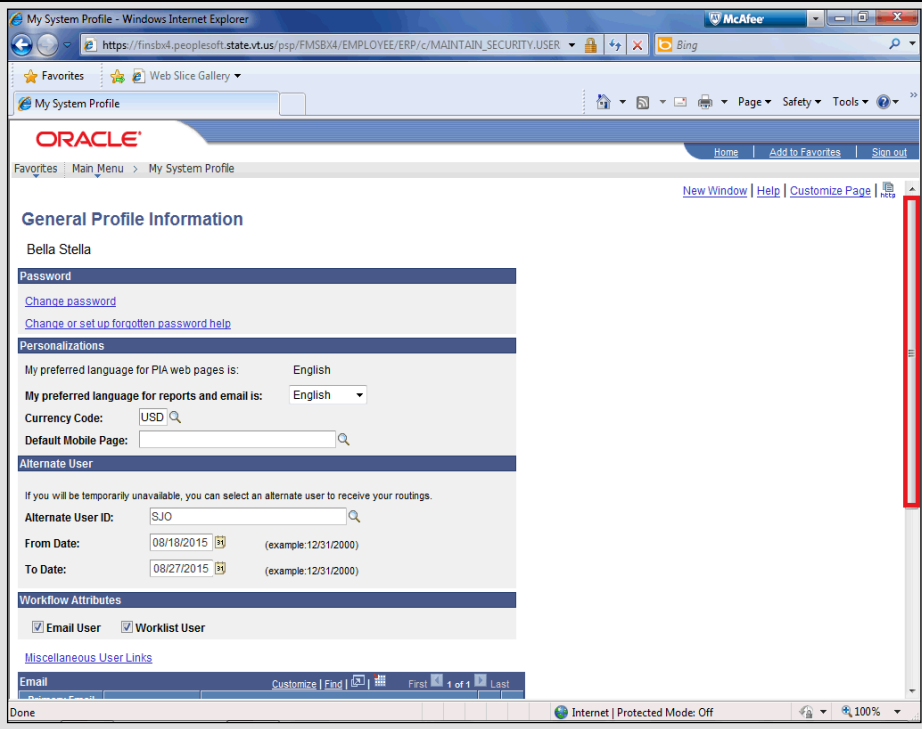
#### The Basics:

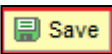
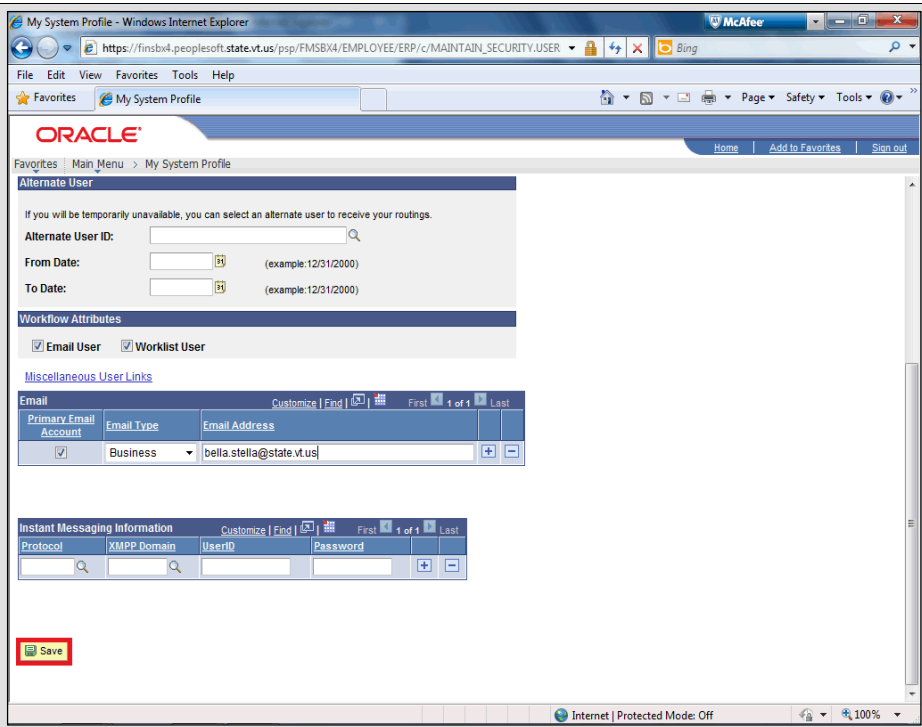
- An Alternate Approver is set up by a supervisor during an extended absence. When an alternate approver is set up, only the alternate approver will have access to approve the reports for the time period designated.
- Alternate Approvers are for use **ONLY** in the case of extended absence.
- **Worklists** need to be clear of all pending transactions before an alternate is set up. (Designating an alternate does not re-direct transactions waiting for your review).
- Alternates are required to have Approver level **security**. Assigning an alternate does not grant that person security.
- The Alternate Approver should be someone in your organization who is either a peer or superior, not a subordinate.
- You will need to know the employee's VISION user ID to designate them as an alternate approver.

Step	Action	
1.	. Click the <b>Main Menu</b> button. 	

Step	Action	
2.	Click on <b>My System Profile</b>	

Step	Action	
3.	Enter the VISION User ID for the employee that is going to be your alternate into the <b>Alternate User ID</b> field.	
4.	Enter dates in the <b>From Date</b> and <b>To Date</b> fields. The From Date should be the first day of your absence and the To Date should be the date before you return to work	

Step	Action	
5.	Scroll down to view the bottom of the page.	

Step	Action	
6.	Click the <b>Save</b> button. 	

**End of Procedure.**